FSE Passport:
Your Gateway to the European Food Supplements Sector

food supplements europe

Table of Contents

Message from the Chair

On behalf of Food Supplements Europe (FSE), I am pleased to present the FSE Passport. This publication introduces who we are, highlights our current priorities, and demonstrates how our sector contributes to both public health and Europe's economic vitality.

Food supplements are already part of the daily health routines of millions of Europeans. They support well-being, help fill nutritional gaps, and can even ease pressure on national healthcare systems by contributing to reducing the risk of age-related diseases such as cardiovascular diseases and osteoporosis across Europe.

Our sector is driven by science, consumer trust, and innovation. But it is also shaped by policy. With your awareness and support, we can unlock the full potential of food supplements, supporting healthier citizens and a stronger European economy.

Kind regards,
Peter Loosen – *Chair,*
Food Supplements Europe

Executive Summary

Who We Are

Food Supplements Europe (FSE) represents food supplement manufacturers and ingredient suppliers across Europe, 95% of which are SMEs. FSE is composed of national associations and businesses, and works to ensure that EU food and nutrition policy safeguards consumer health while promoting innovation, choice, and competitiveness.

Key Takeaways

The FSE Passport offers a snapshot of the European food supplements industry, highlighting up-to-date data and key contributions of the sector to public health, economic growth, and overall competitiveness. It also outlines the EU's regulatory landscape and highlights urgent policy areas where harmonisation is needed to reduce fragmentation and unlock the sector's full potential.

- In 2024, the European food supplements market was **valued at €19.5 billion**, with strong growth projected.
- The sector directly supports **over 100,000 jobs** and contributes **€9 billion in annual exports**.
- With close to 90% of all new food authorisations, European food supplements represent the **most innovative sector in the food industry**.
- Scientific evidence demonstrates that targeted supplementation can result in measurable **healthcare cost reductions.**
- Inconsistencies in regulating health claims and maximum levels of vitamins, minerals, botanicals, and novel foods limit the sector's full potential.

Unlocking the Full Potential of Food Supplements

Policymakers can accelerate change by:

- **Harmonising rules for maximum levels** of vitamins and minerals across the EU, using a scientific approach that ensures safety and reflects the needs of the European consumer;
- Bringing awareness to the issue of micronutrient gaps, malnutrition, and how food supplements can be incorporated into public health strategies to **ease pressure on rising healthcare costs;**
- Streamlining the novel food authorisation process to foster innovation and competitiveness;
- **Recognising tradition of use** as valid evidence for botanical health claims, thereby aligning standards with those applied to traditional herbal medicinal products (THMPs);
- **Mandating the appropriate use of impact assessments** for all delegated and implementing acts.

The European Regulatory Framework for Food Supplements

What Are Food Supplements?

Coming in many shapes and sizes, food supplements are concentrated sources of nutrients or other substances with a nutritional or physiological effect.

In addition to vitamins, minerals, amino acids, and essential fatty acids, food supplements can contain plants and herbal extracts, commonly known as botanicals. Examples of well-known botanicals include ginkgo, garlic, St. John's Wort, and ginseng. Since the 1970s, food supplements have been available via pharmacies, retail shops, direct sales, and online to support people's health.

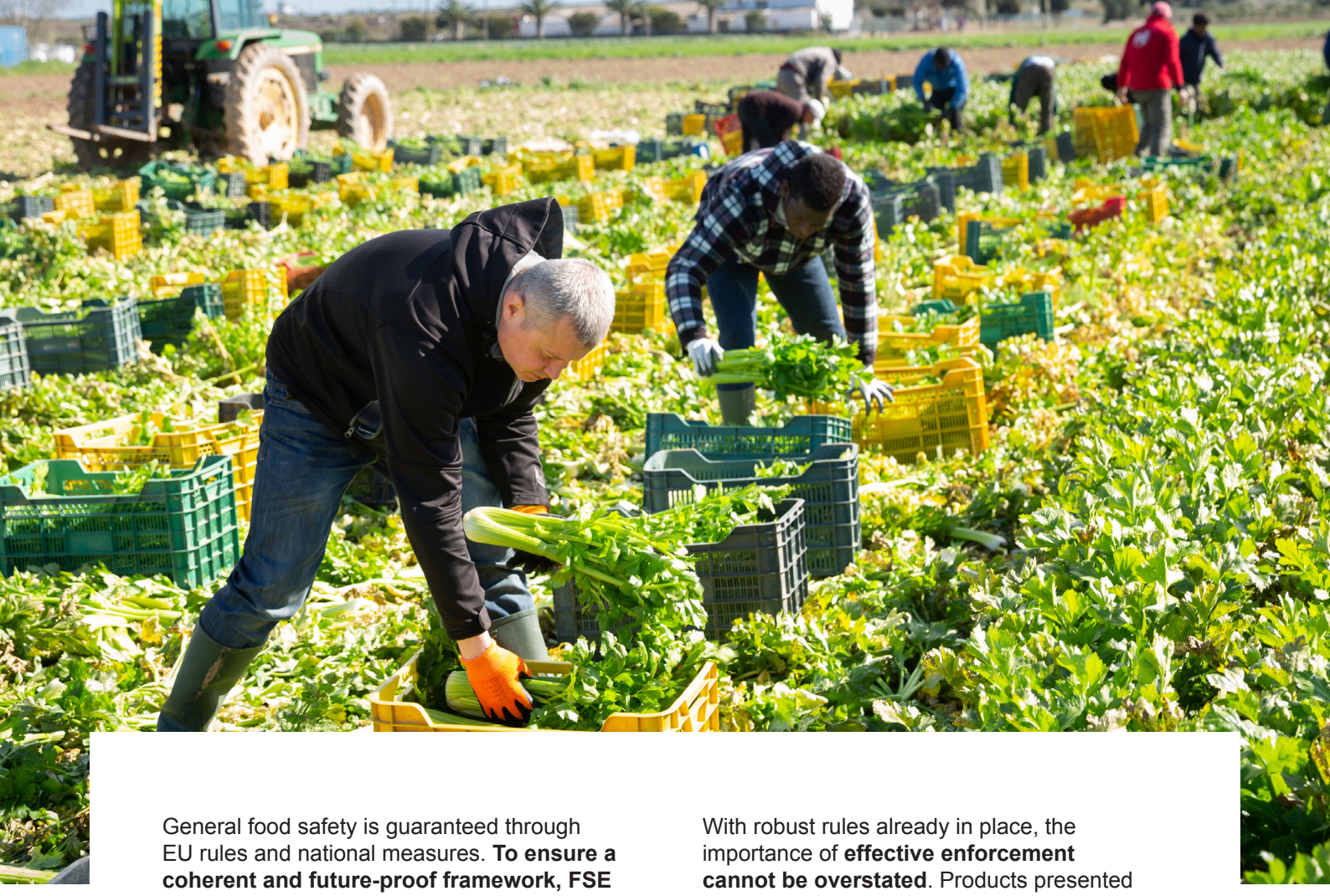
How Are They Regulated?

Food supplements are strictly regulated by both EU and national legislation.

The cornerstone of EU legislation for food supplements is Directive 2002/46/EC, which defines food supplements and establishes a list of permitted vitamins and minerals, as well as their sources. However, maximum permitted levels (MPLs) and the use of botanicals are still regulated at national level, leading to fragmentation within the Single Market. Regulation 1924/2006, known as the "Nutrition and Health Claims Regulation," sets conditions for nutrition and health claims made on food supplements.

In addition, food supplements must comply with all applicable horizontal food legislation, including:

Regulation	Scope
Regulation (EC) No 1925/2006 – Article 8	Enables the European Commission to restrict the use of substances other than vitamins and minerals, based on safety assessment by EFSA.
Regulation (EU) 2023/915	Sets maximum levels of contaminants in food supplements, such as heavy metals, polyaromatic hydrocarbons, and pyrrolizidine alkaloids, etc.
Regulation (EC) No 1333/2008	Specifies the permitted food additives that may be used in food supplements and their conditions of use.
Regulation (EU) 2015/2283	Requires pre-market authorisation of novel food ingredients for use in food supplements.



General food safety is guaranteed through EU rules and national measures. **To ensure a coherent and future-proof framework, FSE calls for the following priority actions at EU level:**

- **Harmonisation of maximum levels of vitamins and minerals** in food supplements through an approach based on scientific risk assessment, which avoids market distortion.
- Revision of the health claims framework to **incorporate tradition of use as the basis for botanical health claims.**
- **Adoption of a more balanced risk–benefit approach** in assessing substances under Article 8 of Regulation 1925/2006, one that fully considers the long history of safe usage and the benefits of these products.
- **Acceleration and streamlining of EU authorisation processes (e.g., Novel Foods, Health Claims)** to support innovation and protect the competitiveness of EU companies.

With robust rules already in place, the importance of **effective enforcement cannot be overstated**. Products presented as food supplements that do not comply with EU rules, and are often promoted with unjustified or unauthorised claims, are readily available online and can be purchased by European consumers. Such practices mislead consumers, create unfair competition for compliant manufacturers on the EU market, pose risks to safety, erode trust in the sector, and trigger calls for new regulations that ultimately penalise law-abiding businesses.

FSE therefore urges the European Commission and national authorities to strengthen the enforcement of existing EU and national rules. FSE also calls on MEPs to recognise that the European food supplements sector requires stronger enforcement, not additional regulation.

Public Health in Context: How Much is at Stake?

Find Out More: The Value of Supplementation

In 2022, EU Member States collectively spent more than €1.6 trillion on healthcare, representing 10.4% of the Union's GDP[1]. Life expectancy continues to increase, and nearly 30% of the EU population is expected to be over 65 by 2050. This demographic shift is intensifying the strain on healthcare systems and public budgets[2]. The need for proactive public health strategies to alleviate this burden and bolster public health is clearer than ever.

Scientific evidence demonstrates that targeted use of food supplements can help reduce the risk of chronic diseases while delivering significant savings to national health systems. Some prominent examples include[3]:

In addition, studies show that millions of Europeans fail to meet basic recommended intakes, particularly for nutrients such as vitamin D, iron, and omega-3 fatty acids[4]. EFSA has also acknowledged inadequate intakes of dietary fibre and potassium in the European populations[5]. Another study of 21 European countries for which adult data were available found that none of the countries met more than 40% of the recommendations for micronutrients.[6]

Widespread malnutrition contributes directly to chronic disease, particularly among older adults, highlighting the role that food supplements can play in addressing this challenge.

Supplement	Target Group	Health Impact	Estimated Savings (2016–2020)	Benefit-Cost Ratio
Phytosterols (1.7 g/day)[7]	31.1 million Europeans aged 55+ with severe hypercholesterolemia	Reduces LDL cholesterol, lowering cardiovascular disease risk by 2.3%	€5.30 billion in avoidable healthcare costs/year; over 170,000 hospitalisation events avoided/year;	€4.37 saved per €1 spent
Omega-3 (EPA & DHA)(1000 mg/day)[8]	38.4 million Europeans aged 55+ with cardiovascular-related disease	Reduces cardiovascular-related hospitalisation risk by 4.9%	€12.9 billion saved/ year; approximately 300,000 events avoided /year;	€2.29 saved per €1 spent
Calcium (1000 mg/day) + Vitamin D (15 µg/day)[9]	27.8 million Europeans aged 55+ with osteoporosis, approximately 80% of whom are women	Reduces osteoporosis-related fracture risk by 15%	€3.96 billion in avoidable healthcare costs/year; over 186,000 osteoporosis-attributed bone fractures avoided/year;	€3.47 saved per €1 spent

Key Consumer Insights

Find Out More:
Who Takes Food Supplements and Why

Food supplements are a key component of the everyday health and wellness routines of millions of Europeans. According to a pan-European consumer survey commissioned by FSE and conducted by IPSOS, 88% of respondents from 14 EU Member States had used a food supplement at some point in their lives, with 93% of this group using them within 12 months of the survey.[10]

Usage Patterns by Demographic Group

Demographic group	Key findings
Women	More likely to take vitamin D, magnesium, iron, and B vitamins.
Men	Report higher consumption of vitamin C and omega-3 or fish oils.
Older Adults	More likely to use supplements to support heart health and maintain normal blood pressure.
Younger Consumer	Use supplements to increase energy levels, address nutritional gaps, and improve sleep quality.

Maintaining overall health is the most commonly cited reason for consuming food supplements, as indicated by 52% of respondents. Moreover, 45% of respondents take food supplements to support their immune system, and 29% stated they take food supplements to boost their energy levels.

The use of food supplements is underpinned by high levels of consumer trust. According to the survey, 7 in 10 respondents (69%) said that they trusted food supplement brands to provide reliable information, with the majority expressing either “a fair amount” or “a great deal” of confidence in the sector.

The Economic Contribution of the European Food Supplements Industry

Market Size & Growth

Increasing health awareness, and an ageing population contribute to a strong market for food supplements, and European manufacturers have responded in kind, with leading innovations in the field. The European market for food supplements reached an estimated €19.5 billion in 2024[11]. Italy, Germany, and France accounted for just over half of the total market share, contributing approximately €4.7 billion, €3.8 billion, and €2.5 billion, respectively.[12] Beyond these markets, the Polish market was valued at approximately €1.6 billion, the Spanish market grew to over €1 billion, and the Belgian, Romanian, and Dutch food supplements markets each contributed between €700 and €900 million to the European economy.[13]

Driven by a compound annual growth rate (CAGR) of 5.6%, the European food supplements industry added approximately €4.8 billion to the European economy between 2019 and 2024.[14]

Forward-looking projections indicate that this growth will continue at a 4.3% CAGR, contributing an additional €4.5 billion to the European economy by 2029. Poland is expected to witness the strongest growth at 7.1%, followed by Bulgaria, Spain, and Romania.[15]

European Food Supplements Market Value by Country (2024)

Global Impact: Export & Innovation

In addition to satisfying domestic demand, EU food supplements are a prominent export product on the global market. In 2022, the industry exported €9 billion worth of food supplements to all corners of the globe. The United Kingdom was the top destination for food supplements produced in the EU in 2022, followed by the United States and China.[16]

In 2023, the sector solidified Europe's position as a global leader in food supplement innovation, driving the highest number of new product launches worldwide.[17] An analysis of new food authorisations between 2018 and 2025 suggests that approximately 90% of these authorisations in the EU are linked to food supplements, illustrating the sector's central role in driving forward safe and science-backed innovation.[18]

Reflecting this momentum, the European food supplement market has recorded a steady 5% CAGR for new product launches over the past four years.[19]

Employment

The European food supplements industry directly supports more than 100,000 jobs. This includes direct employment in manufacturing, product development, quality control, marketing, and distribution. Additionally, our sector creates upstream jobs in agriculture and ingredient supply. For example, the cultivation and processing of botanicals for use in food supplements alone supports more than 20,000 agricultural jobs across the EU.

The European food supplements industry directly supports more than 100,000 jobs.

A Smarter EU Framework

Harmonising Maximum Levels

Maximum levels for vitamins and minerals permitted in food supplements are not currently harmonised across the EU. This results in divergent rules among Member States, creating barriers to cross-border commerce.

Mirroring the spirit of the EU's Single Market Strategy 2025, FSE has long called for the harmonisation of maximum levels of vitamins and minerals (MPLs) as a key step towards a well-functioning internal market while ensuring consumer safety. In 2005, FSE, then known as the European Responsible Nutrition Alliance (ERNA), developed a science-based model to establish safe maximum levels for vitamins and minerals. This model has guided the industry on safe supplementation practices for the last 20 years and continues to do so.

FSE calls for harmonised MPLs based on scientific risk assessment, taking into account the FSE guidance values that have served as the basis for product formulation over the past 20 years. This will ensure safe products across all EU Member States, while preventing unnecessary reformulation and avoiding distortions in the current market.

Recognising Tradition of Use: The Key to Communicating Botanical Health Claims

The assessment of health claims for botanicals is currently on hold because, unlike in the case of traditional herbal medicinal products, the Nutrition and Health Claims Regulation 1924/2006 (NHCR) does not recognise tradition of use as valid supportive evidence to substantiate the benefits of botanical food supplements.

To provide consumers with meaningful information, FSE calls for tradition of use to be accepted under the NHCR.

FSE further emphasises that any future regulatory development must maintain the legal distinction between botanical food supplements and herbal medicinal products. These two separate categories are governed by different legislation and are intended for distinct consumer needs: botanical food supplements for their physiological benefits; medicinal products for disease treatment. Blurring this boundary would lead to unnecessary market distortions in both sectors, disproportionately affecting SMEs, which form the backbone of the food supplements industry.

Novel Foods: EU Innovation

The European food supplements industry has a strong track record of scientific excellence and innovation. However, the current regulatory framework for novel food authorisation is failing to keep pace with sector advancements.

The average approval time for novel food applications is now a staggering three years. With this significant bottleneck, the sector can hardly continue to compete on a global scale. This prolonged timeframe discourages R&D investment in the EU, diverting funding instead towards regions with more streamlined regulatory systems.

It places European SMEs and start-ups—the backbone of innovation in the food supplements sector—at an unjustifiable economic disadvantage relative to their non-European counterparts.

FSE calls for a more efficient approach to novel food applications that upholds the current rigorous safety standards while improving its speed and predictability.

Key measures include reducing the administrative burden of the Transparency Regulation, introducing shorter timelines, aligning scientific data requirements with practical realities, and providing clearer guidance to applicants—particularly SMEs and start-ups.

Working Together

Unlocking the full potential of Europe's food supplements sector requires active support from MEPs and policymakers.

It must be stressed that legislation is only effective when properly enforced, and that new regulations are not the solution to addressing failing enforcement.

FSE calls on Members of the European Parliament to scrutinise the European Commission's work and champion science-based legislation that reflects both the needs of consumers and the realities faced by businesses. This means ensuring that EU rules include workable provisions that pass the SME test—from realistic transition periods to effective implementation measures that safeguard innovation and market access. Equally, all new initiatives, including implementing and delegated acts, must undergo comprehensive impact assessments that cover economic, social and public health impacts and the regulatory burden on SMEs.

Our sector contributes to healthy ageing, cost savings for national healthcare systems, and Europe's global competitiveness. With the appropriate policy framework and greater awareness, this contribution can grow even further—supporting citizens' well-being while driving sustainable economic growth.

FSE stands ready to work hand in hand with MEPs, the European Commission, and all policymakers to design smart, forward-looking legislation. Together, we can ensure that Europe remains a world leader in scientific innovation, consumer protection, and economic opportunity.

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